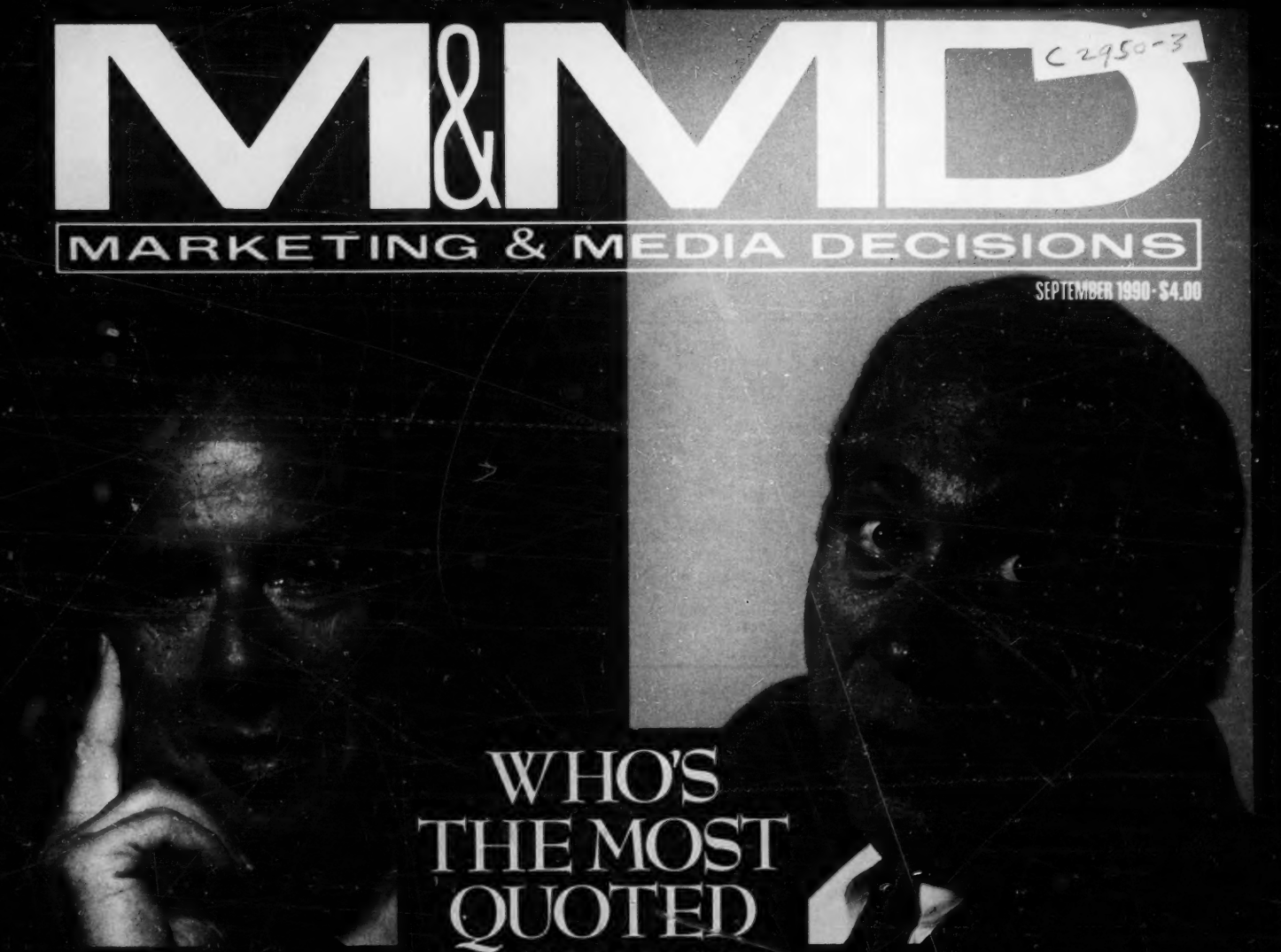
INSIDE: New Men's Mags ■ Networking Public TV ■ Airline Turbulence

M&MD

C2950-3

MARKETING & MEDIA DECISIONS

SEPTEMBER 1990 · $4.00



WHO'S THE MOST QUOTED OF THEM ALL?

Is it Bozell's Drexler, FCB's Ostrow, Lintas' Schultz or JWT's Kostyra?

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A marketer blames marketers for the sneaker controversy, and the NAB's numbers man takes issue with LNA.

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Who's the most quoted of them all? We've got an answer for you, at least among top media directors. The fact is, the most quotable notables in agency management these days — surprise, surprise — are coming out of the media department. This has as much to do with some of the individuals involved as it does with media's new center-stage status. Who's served best by media's new public persona?

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It's no secret that public tv attracts the right kind of demographics. Now eased ad rules have encouraged two rep firms to offer network-like buys, and PBS is studying one plan and may offer some public advice.

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So what if SRDS lists specifics on 47 titles under the "Men's" heading, plus references to dozens of others? The new guys in town — *Men's Life*, *Details*, *M Inc.*, and several others out or under development — feel they've got something new to say to today's macho man with soul. They'd better. This is a pretty rough time to try and break into the ranks.

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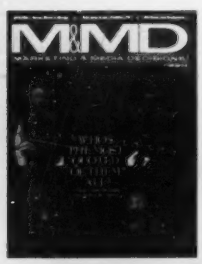
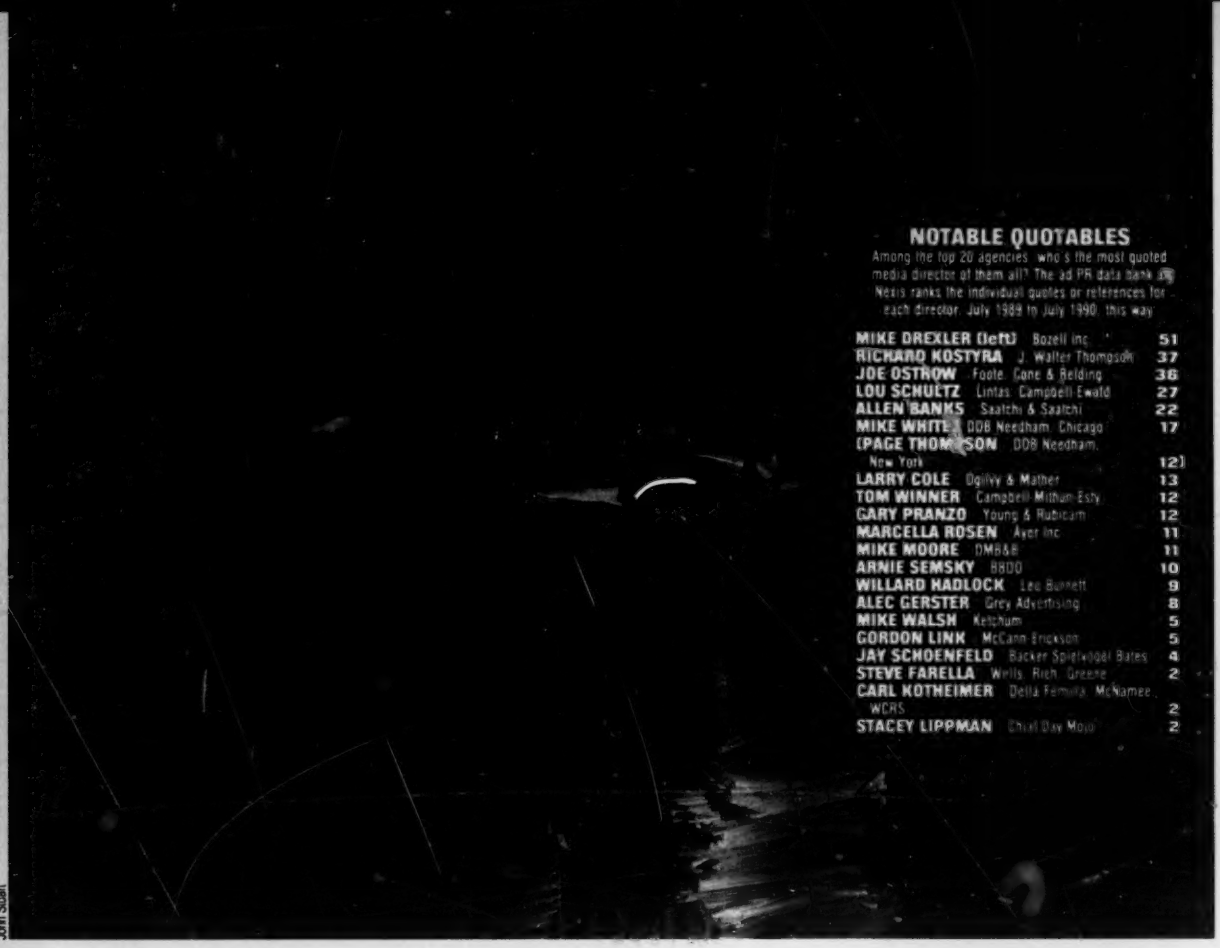


Cover subjects, clockwise from upper left: Mike Drexler, Lou Schultz, Joe Ostrow, Richard Kostyra.

Cover photography by John Stuart



NOTABLE QUOTABLES

Among the top 20 agencies, who's the most quoted media director of them all? The ad/PR data bank at Nexis ranks the individual quotes or references for each director, July 1989 to July 1990, this way:

MIKE DREXLER (left)	Bozell Inc.	51
RICHARD KOSTYRA	J. Walter Thompson	37
JOE OSTROW	Foote, Cone & Belding	36
LOU SCHULTZ	Lintas: Campbell-Ewald	27
ALLEN BANKS	Saatchi & Saatchi	22
MIKE WHITE	DDB Needham, Chicago	17
PAGE THOMPSON	DDB Needham, New York	12
LARRY COLE	Ogilvy & Mather	13
TOM WINNER	Campbell-Mithun-Esty	12
GARY PRANZO	Young & Rubicam	12
MARCELLA ROSEN	Ayer Inc.	11
MIKE MOORE	DMB&B	11
ARNIE SEMSKY	BBDO	10
WILLARD HADLOCK	Leo Burnett	9
ALEC GERSTER	Grey Advertising	8
MIKE WALSH	Ketchum	5
GORDON LINK	McCann-Erickson	5
JAY SCHOENFELD	Backer Spielvogel Bates	4
STEVE FARELLA	Wells, Rich, Greene	2
CARL KOTHEIMER	Della Femina, McNamee, WCRS	2
STACEY LIPPMAN	Chiat/Day Mojo	2

LOOK WHO'S TALKING

by Joe Mandese

Everybody knows Mike Drexler likes to talk. Now we know how much.

From July 1989 to July 1990, the loquacious Drexler, media director of Bozell Inc., was quoted in 51 different articles in the ad/PR press, according to a search of the trades by *M&MD*, conducted via the Nexis data bank. That makes Drexler King of the Quotables among media directors at the top 20 agencies.

These days, in the trade and general press alike, he's hardly alone. Topping off the media directors' list (see chart) are J. Walter Thompson's Richard Kostyra; Foote, Cone & Belding's Joe Ostrow; and Lintas' Lou Schultz.

Other media directors take a lower profile and turn elsewhere to keep their departments in the press — Alec Gerster, for instance, media director at Grey Advertising, only received eight mentions, but his print pointman Paul DuCharme and tv honcho Jon Mandel racked up a total of 94 articles between them. And some agencies have delegated responsibility to special media titles to handle the press: Betsy Frank, in fact, senior vice president and director of television information and new media at Saatchi & Saatchi, was the most mentioned media person in our search, with 96 references, followed closely by McCann-Erickson forecaster Bob Coen with 83.

Media departments in high profile? Media directors as personalities? Is this the same job whose practitioners were once characterized as humorless number-crunchers in ill-fitting suits and practical shoes?

No way. In an era obsessed with people and perceptions, and in an industry that loves to talk about itself, the doors are opening wide to the once-closeted media department. Whether by choice, by default or by delegation, public pronouncements are now part of the job for many media people.

For agency management, the increased

coverage of media issues is an opportunity to keep their shops top of mind. For clients, their media spokespeople offer a chance to influence marketplace issues, attract special media opportunities and keep their media departments on their toes when its comes to fast-breaking media events. And for media people, this new visibility can be a curse or a blessing. Or both.

Drexler and court go out of their way to maintain good relations with the press and get exposure. They also encourage younger people on their staff to take on spokesperson roles, when appropriate. Others, like Backer Spielvogel Bates and Leo Burnett, maintain low profiles, preferring to let their work and their clients' successes speak for themselves.

"It's not that we're silent; it's just that we're reticent about talking about the way we do things," explains BSB media director Jay Schoenfeld. Burnett media director Willard Hadlock says his agency's low-profile stems from its location outside of New York, a corporate culture that detests "bragging" and a lack of time.

But Hadlock concedes that a higher profile in the press might benefit his agency's awareness among current and prospective clients. "I think that is absolutely correct, and our PR people are trying to do that," he says. "How successful are they? I don't know."

It's possible that sentiment serves Burnett well by reinforcing the agency's iconoclastic image. But most shops acknowledge the value of good PR and the need to build an awareness of their media departments to differentiate themselves from what is perceived as a parity service.

"I do it to have some possible influence on industry issues," says Drexler. "And I like to get my point of view heard."

"Everytime we see those four letters B-B-D-O somewhere, hopefully in a positive light, it will make the cash register ring," adds an unabashed BBDO media director Arnie Semsky, who generated ten mentions. "It creates an awareness with our consumers, who are our own clients, and new business prospects, the media and advertising community at large." He also believes awareness helps the agency attract a better caliber of employees. Lastly, Semsky says such visibility leads to greater media opportunities. "Salespeople tend to come to us first, because we have a good reputation," he says.

That last rationale was a primary motivation behind one of the most omnipresent of media spokespeople, though he's since moved to the sales side. "It was not my goal to become the most pervasive spokesperson in the business," says Leo Scullin, publisher of *Men's Life* magazine and former print maven at Young & Rubicam. "The high profile part of it came as a by-product of doing the first part right, which was getting to know the industry," he explains.

ELSEWHERE IN THE MEDIA DEPARTMENT, A RANDOM SEARCH FINDS THE FOLLOWING NUMBER OF REFERENCES:

Betsy Frank
Saatchi & Saatchi's tv new media cost guru, **96**

Bob Coen
McCann-Erickson's forecaster, **83**

Bob Zach, Henry Antosz
Chiat/Day/Mojo NYC and LA department heads, **22** and **6**, respectively

Paul DuCharme, Jon Mandel
Grey Advertising's print and tv pointmen, **49** and **45**, respectively

Nancy Smith
Young & Rubicam media mainstay and print strategist, **24**

Judy Black
Bozell's media strategist, **2**

Interestingly, the print-specialist position and Scullin's high-profile use of it helped create the perception that Y&R was the leading print-buying agency when, in fact, it was not. "It became a self-fulfilling prophecy," explains Scullin. "If you are perceived to be in the know and in the vanguard, you end up being in the know and in the vanguard, because people keep letting you know what's going on."

If anyone has picked up Scullin's reigns, it has to be Grey associate media director Paul DuCharme, who posted 49 trade press references during the same period. And it was no accident.

Grey media director Alec Gerster acknowledges that he encouraged DuCharme to court the press to earn a greater share of mind on print matters, and the move appears to have worked. Grey, which buys more print than Y&R, is now perceived as the agency that was in the forefront of rate negotiating.

If such visibility is important for major agencies like Grey and Y&R, it is doubly important for smaller agencies and media buying services that have to compete against well-established agency brand names. "Once you get past the top 15 or 20 agencies, there is a misperception that the remainder are merely creative boutiques," explains Hal Riney & Partners media director David Verklin. He adds that taking a stand on high-profile media issues helps offset that perception.

Chiat/Day/Mojo New York media director Bob Zach agrees. He is one of the media people who pretty much came to the spotlight by default. Once quoted, one mention bred another, leading to a score of 22 mentions in the press for the July-July year vs. the six mentions of his boss Stacey Lippman and two for his West Coast counterpart Hank Antosz.

Zach feels that although the agency has a good reputation for creative media projects like the Apple "1984" campaign or Apple's single-sponsorship of *Newsweek* magazine, clients really are looking for "management ability in terms of the stewardship of the business. They really want solid, basic thinking, rather than creative promotional ideas."

While such visibility clearly has benefits for the awareness of an agency's media department, media directors say it also benefits their clients in mostly indirect ways. For one thing, agencies are able to influence the outcome of important issues covered in the press that can affect their clients' business. For another, having a high visibility in the press makes their clients feel like their agencies are in the know. It also helps the line people on the client side send a positive signal to senior client management, who don't have direct contact with the agency's media department.

And as McCann-Erickson's press-clipping king Bob Coen notes, baring your thoughts in the press provides an added degree of accountability. "That public out there tends to be a pretty good yardstick to make sure that what you're saying is not just a lot of b.s."

If an overtly public persona can benefit an agency and its clients, what does it do

for the individual? Most obviously, it feels good: "It's a kick to see your name in print," says Semsky. But besides the ego gratification of high visibility, it also can boost a career. "If an agency is looking for a senior media person, top of mind counts a great deal," observes Kurt O'Hare, president of media department recruiting firm Career Projections.

"If I'm looking for a senior person, I will look at what they've done publicly to see how they express themselves," admits JWT's Kostyra. In a more general sense, FC&B's Ostrow says it helps an individual establish his or her own brand. "It starts creating a reputation for the individual, and that helps enhance a career."

That opinion may reflect the fact that Joe Ostrow, with 36 mentions, is among the more public media minds in the business. Others warn that it can easily backfire. "There are times when it can be overdone, when management of the agency will say, 'All this person does is talk to the press.' They may say, 'I think I know what the agenda is here and it's on our time,' " says DMB&B worldwide media director Mike Moore, who is not exactly a wallflower himself.

Others have had outright negative experiences in dealing with the press, either by an inadvertent slip of the tongue on a sensitive issue or by being misquoted or having their comments taken out of context. When DDB Needham media planner Christine Hawkinson was asked to be interviewed for an article about media planners a couple of years ago, she jumped at the opportunity for the exposure. Even her media director Page Thompson thought it would be a good opportunity for the young media executive. But when the article depicted her and her colleagues as frivolous party-seekers who based their media plans on media patronage, it turned out to be damaging publicity for the agency, the individuals and the media discipline.

"It was very negative," recalls Hawkinson, who is still a planner with the agency. "The agency was terrific about it, because they knew that things were taken out of context. But the overall reaction from the industry was very negative. I'm *still* hearing about it."

"It's like writing a media plan," says BBDO's Semsky. "You have to get exposure in the right places at the right time." Seconds an agency PR executive who asked not to be identified, "We coach our people to treat it like an ad. If possible, every quote attempts to bring the subject back to the point you are trying to make."

Agencies' communications and public relations executives report they generally counsel their executives on a one-on-one basis as needed. However, they note that media generally is an area that requires less coaching than other parts of the agency business.

"As long as you're not talking about your client's business, there are less sensitivities in media," says BBDO spokesman and former *Advertising Age* New York bureau chief John O'Connor. "Plus, media people are very bright." ■

THE TALKING HEAD

While media directors are showing up in the press more and more frequently these days, the most quoted media person in our Nexis search was not a media director. And, no, it wasn't McCann-Erickson's ad authority Bob Coen. It was Saatchi's Betsy Frank who, with 96 references, was just about as quotable as ubiquitous ad man Jerry Della Femina, who had 100 references.

What, her worry? Saatchi's Betsy Frank had to overcome stage-fright to face her public.

"My friends keep complaining to me that they can't open a copy of *TV Guide* without seeing my name," quips Frank, noting that such exposure was an outgrowth of her job, not its goal. "It was never my mandate to generate a lot of press," she says. Her job was intended to be an internal resource for Saatchi and its clients. However, sensing the potential PR value of Frank's insights, Saatchi media director Allen Banks has encouraged Frank's spokesperson role.

Initially, she confesses, she was terrified of the prospect of speaking to the press and especially of giving public speeches. While experience helped her overcome her anxiety, Frank also sought out training from a "presentation skills consultant," Barbara Boltax, who regularly counsels Saatchi executives on public speaking.

In general, Boltax, president of Boltax Inc., says remembering a few simple points will produce better results when making public statements. "You have to know what you want to say and what you don't want to say going in. If you remember that, you should do well," says Boltax.

Or, as Saatchi & Saatchi's Frank has learned after countless interviews, "You answer the question you want to answer." At no time in her spokesperson role did she learn this better than when she appeared on the *CBS Morning News*. The show's producers had invited her to speak about "commercials in front of movies," and Frank assumed they meant ads in front of films on videocassettes. She even called the producer to confirm it.

Come the day of the interview, CBS whisked Frank off to their studios in a limousine, and while waiting to step out on the live studio set, the producer began chatting with Frank. That's when she discovered that they actually meant "commercials in front of movies" shown in *theaters*. She managed to persevere despite the last-minute curve. "The experience really built my confidence," she says. "If I could think that fast and survive that situation, I could do anything."

BRAND REPORT

FEAR OF FLYING

The wild blue yonder is getting wilder as major domestic air carriers struggle in a bitter dogfight to fill seats. Using deregulation as ammunition, stronger carriers either shot down or captured weaker airlines during the past decade. The seven leading domestic airlines now control 80%-90% of the skies.

While some say this represents an anti-competitive oligopoly, others see the fight as still fierce. "The remaining carriers have produced all kinds of new services in markets that they didn't travel before, and have become far more competitive," says David Swierenga, assistant vice president of the Air Transport Association of America in Washington. He maintains that competition has actually increased since fewer routes are served by one carrier. Eleven percent of U.S. fliers travel on routes where a single carrier provides the service, compared with 30% ten years ago. The industry was deregulated in 1978.

Half of the ad dollars go to newspapers, where a total of $209.7 million was spent last year by the top seven airlines, according to Leading National Advertisers. Price is the main theme: A quick look through the daily papers yields ads boasting two-way fares from New York to Charleston and Miami for $218 and California for $426 on USAir. TWA can get you to Florida and back for $178 and to California for $358.

Airlines would like to avoid the turbulent pricing game since it drives down profits and, if it continues, may ground more carriers. The average fare per mile was 13.67 cents for January through May, down about one-tenth of a cent from a year ago, according to the Air Transport Association.

Lee Howard, chief executive officer of Airline Economics, a Washington-based consulting company, says the industry's operating profits are losing altitude. "In 1988 it was $2.8 billion, and it dropped to $1.4 billion in 1989," he says. "If you look at 1990, we see another big drop in operating profits. We forecast between $400 and $600 million, which is about one-third to one-half of last year," he explains. "And there's very little question that it's an efficient industry, because they have taken all kinds of cost-control measures in the meantime." Rising oil prices, ignited by the Iraqi confrontation, are further squeezing

by Brian Bagot

BRAND REPORT NO. 173
DOMESTIC AIRLINE AD EXPENDITURES
APRIL 1, 1989 – MARCH 30, 1990 (000)

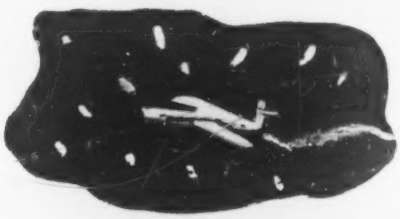
	Media Total	BAR Network TV	BAR Spot TV	BAR Cable TV	BAR Syndicated TV	RER Spot Radio	LNA Magazines	MR Newspapers	LNA Sunday Magazines	LNA Outdoor	BAR Network Radio
United	$85 658.2	$44 787.4	$10 214.8	$2 597.4	$20[illegible].3	$8 579.6	$11 167.6	$5 999.0	$187.8	$708.7	$1 219.3
American	87 272.8	7 825.2	21 320.6	582.1	75.0	4 085.6	9 362.2	42 405.4	722.2	395.9	534.6
Delta	97 974.1	30 980.3	4 488.4	2 [illegible]38.3	[illegible]6.5	9 689.9	2 698.0	45 300.0	[illegible]8.3	2 444.4	
US Air*	30 846.4	8 345.4	8 996.8	[illegible]7.6		2 258.7	30.4	9 328.6		[illegible]330.0	
Northwest	56 648.3	[illegible]7 683.0	2 [illegible]15.3	[illegible]1 585.8	[illegible]745.3	2 360.8	[illegible]7 658.2	23 106.0	86.5	330.0	
Trans World	44 540.[illegible]		12 647.2	209.1	66.0	962.9	4 981.7	25 944.0	296.3	302.5	
Pan Am	46 821.4		8 [illegible]88.6	59.[illegible]		3 849.8	[illegible]230.[illegible]	33 648.[illegible]		648.9	

Sources: Broadcast Advertisers Report (BAR); Radio Expenditures Report (RER); Leading National Advertisers (LNA); Media Records (MR).
* Does not include Piedmont.

airlines. Several tried to add fuel surcharges, but TWA and Eastern took the opportunity to start a new round of price-cutting.

Although airlines are trying to shift the emphasis from price to image, promotion-oriented ads are here to stay. Discount fares are not only ingrained in the consumers' mind, but airline management is used to this strategy. However, service will become more important in the '90s. Delta is playing it up with its image campaign, "We Love to Fly and It Shows," on tv and in magazines. And at United, the airline stresses its worldwide scope, with service throughout the U.S., Europe and across the Pacific.

Eastern, which has filed Chapter 11, is struggling to win back consumer confidence with a campaign starring the airline's court appointed trustee, Martin Shugrue. Created by Ogilvy & Mather, the spot called '100 Days' has Shugrue promising that "in the next 100 days, Eastern is going to get a little better every day." The daring ad strategy confronts head on Eastern's bad reputation with flyers. But Howard states, "As good as Marty Shugrue may be, it's a tough battle."



With airlines hooked on price promotion and freebies, profits are in a nosedive.

The business traveler is the primary target for all airlines, and tv schedules center around sports, Sunday news programs and morning news shows. Combined network, spot, syndicated and cable spending totaled $173.5 million last year.

Their magazine selection is more diverse and includes *Architectural Digest*, *Better Homes and Gardens*, *Black Enterprise*, *Forbes* and *National Geographic Traveler*. Magazine placements cost the group $37.2 million last year, according to LNA.

The biggest promotional strategy used by just about every carrier is the frequent-flier program, where miles flown add up to points towards seating upgrades and free trips and. lately, products and services. "There are a lot of freebies with these programs," says Walter Gunn, assistant clinical professor of psychiatry at Central State Missouri University and an airline pilot for 39 years. "They've let the toothpaste out of the tube, and frequent flier is going to have to stay." He would prefer competition to come from improved service, schedule operation and pleasant personnel.

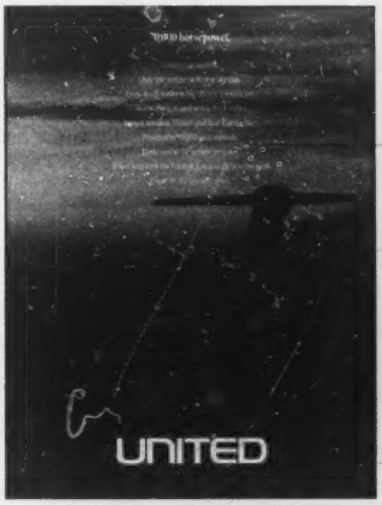
Howard sees some moves in that direction, "but you're not going to see price competition go away." He says some Max Saver fares are up to 80% below the normal coach fare, and that about 90% of all domestic travelers are using some form of discount fare. The split between business and non-business travelers is about 50/50.

The low-flying prices have attracted the attention of some consumer groups. Christopher Witkowski, director of Aviation Consumer Action Project, a group founded in 1971 by Ralph Nader to work on improving safety, service and passenger rights, points out that some airlines were advertising $30-$49 fares between New York and Washington, but there were no seats available at those fares for six months after the ad ran. "In 1987, we filed a petition which asked that the DOT require airlines to set aside 10% of the seats on flights for the deepest fare advertised," says Witkowski. "If they didn't set aside this many seats, then they should notify in the ad that fewer than 10% of the seats were available on that flight." Currently, the airlines just say that seats are limited or restrictions may apply.

The Justice Department is investigating whether carriers are violating anti-trust laws through an electronic posting of fares via the Airline Tariff Publishing Co. It's alleged that the airlines signal each other through the fare clearinghouse, in effect setting prices. The airlines, of course, deny the charges.

Following is a bird's-eye view of the marketing and advertising strategies pursued by the leading domestic carriers, based on *Fortune*'s January 1990 ranking of the top airline companies.

United



United plays up its scope in this image-building magazine ad.

United, the leading domestic carrier and up to its wing-tips in the most protracted (and still undecided) employee buyouts in history, has built its image as a quality airline serving not only the U.S., but the world. Its current image tv campaign from Leo Burnett, Chicago, depicts the airline as understanding the needs of the businessperson. One commercial shows a company that was just fired because its people relied on the telephone and fax. So now they're going to take to the sky and renew their acquaintances.

Business fliers are attracted by the Mileage Plus frequent-flier program and the Premiere program for the very frequent flier. Premiere fliers receive upgrades to higher classes, special 800 numbers for services and special customer-service representatives. They also are sent the quarterly *Mileage Plus* newsletter, which keeps them posted on special events and other happenings at United.

Another hook for the business traveler is the Red Carpet Club. The clubs are business centers at the terminals that offer telephones and computers to its members. The annual fee is $100, or $285 for three years.

"We're able to differentiate ourselves through the programs," says Karen Walsh, director of marketing programs. "But that's also where customer service plays such a key role. And that's what we offer, a breadth of service."

The coveted business traveler is reached through tv and magazines. Television, a combination of network, spot and cable, is United's primary vehicle, at a combined

cost of $53 million last year. Some $40.6 million of that was spent in network, almost exclusively on sports and news programming.

Magazines cost United $11 million last year. Newsweeklies were used to hit the international business traveler, while upscale magazines such as *Gourmet*, *Town and Country* and *Smithsonian* round out the mix.

While the business traveler is the primary target, the leisure traveler is picked up through cooperative advertising with partners in Hawaii and the rest of the Pacific, and occasionally with price promotions and coupons. Some of the image print campaigns run in *Sports Illustrated*, *People* and *Reader's Digest*.

Total media spending for this year's first quarter was $13.8 million.

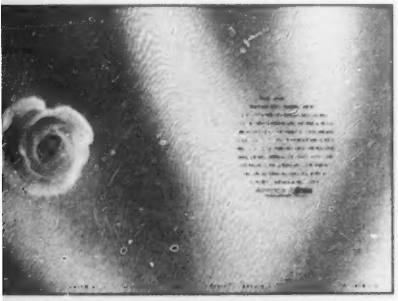
American

Although it's coming off an umbrella campaign built around quality, the primary thrust of American's advertising is tactical, according to Mary O'Neill, an airline spokesperson.

"We figure out what needs support and what we can do to be effective," she says. For example, to help promote its domestic business travel out of Chicago, American recently ran a targeted campaign, from Bozell, Dallas, where the theme was "American Means Business in Chicago."

On another front, the airline has made moves to counter Delta's push in the Dallas/Ft. Worth market — "Based here. Best here." That's the route taken in Texas because, as the company reasons, it's based in Dallas/Ft. Worth and is the largest presence in the area. "Not only do we fly here, we have an investment in the community. We have 25,000 employees in the Dallas/Ft. Worth area who buy houses, live and work in that community," says O'Neill.

Tactical moves on the international scene include building up its premium European service. A campaign in May introduced American's International Flagship Service.



American angles for the international business traveler with luxury.

Worldly Wise?

You bet. In fact, there's hardly an exotic spot on the globe New Orleanians haven't travelled to. That's why singular climes like Guadeloupe and Chichen Itza are familiar to these roving hearts.

And although their travel interests are as unique as the city itself, there's one thing they share. Before New Orleanians plan the "great escape," they tour the pages of The Times-Picayune for the latest on flights, cruises, and travel tips.

So, if you've got big travel plans for New Orleanians, make The Times-Picayune your first stop and final destination.

Purchasers of airline tickets for business purposes past 12 months	83%
Purchasers of cruise tickets past 12 months	90%
Passport holders	87%
Member of professional/ executive occupation household	86%
Member of $35,000(plus) income household	87%

Location: 'Streetcar Named Desire,' collection of the Louisiana State Museum.
Source: Belden CMS, March-December 1988

The Times-Picayune's Sunday Coverage of the N.O.Travel Market:

Purchasers of airline tickets for personal/ vacation purposes past 12 months	84%

ADSAL.

The Times-Picayune

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It played up the upgrading of premium classes on international flights with more comfortable seats, new blankets and pillows, and probably most importantly, better food.

The carrier brought in 19 famous chefs, including Paul Prudhomme, to critique its food. During the past year, the menu has evolved to offer lighter and fresher fare. A lunch flight selection may include skinless, boneless chicken breast on a bun with condiments on the side. And on some flights, there's a salad bar.

Advertising cost the airline $95.3 million last year, according to LNA, with $41 million going to newspapers. Magazine spending totaled $13.5 million and ran in a wide range of titles, including *Architectural Digest*, *Black Enterprise*, *California*, *Modern Maturity* and *Time*.

Network tv cost the airline $10.5 million last year and was all sports, including professional baseball, college and pro football and golf, according to Arbitron's Broadcast Advertisers Report.

First quarter ad expenditures totaled $25.7 million.

In addition, American gets its word out through a newsletter mailed to 11 million AAdvantage (sic) frequent-flier program members along with mileage statements. Also, American conducts telephone surveys of recent fliers.

Delta

Through its campaign, "We Love to Fly and It Shows," Delta is looking to differentiate itself from the others as a company of dedicated employees who love their jobs and are willing to provide better service.

The primary target is men 25-54 who take at least three airline trips a year, while the secondary target is women with the same criteria. The tv campaign is all image with a few exceptions, such as in the very competitive Dallas/Ft. Worth area and the Los Angeles to San Francisco route.

One of the most memorable ads in the general image campaign from BBDO, Atlanta, shows a whole company of soldiers at a phone booth making airline reservations to home. When they're through, the reservation agent's supervisor asks her how many calls she's had. The exhausted agent smiles and answers, "One."

"This works on a lot of levels," says Judy Jordan, assistant vice president of advertising and sales promotion for Delta. "With all the military guys calling out where they want to go, we get out a big size and scope message. Yet we play off the customer-service aspect."

Delta spent $29.3 million in network tv last year, according to LNA. Since the target is primarily men, the tv buy is mostly sports, including Monday Night Football, college and professional basketball and golf. Delta is the official airline for several golf and tennis associations. Other programing included *L.A. Law*, *Midnight Caller* and the ABC Sunday Night Movie, according to BAR.

Magazine advertising ran up a $28.5 million bill last year, according to LNA, in such titles as *Black Enterprise*, *Skiing*, *Essence*,

Knowing consumers are tired of roundups, Delta plays up service.

$9.5 BILLION RETAIL SALES,
$13.7 BILLION IN BUYING INCOME
AND 84% SUNDAY PENETRATION

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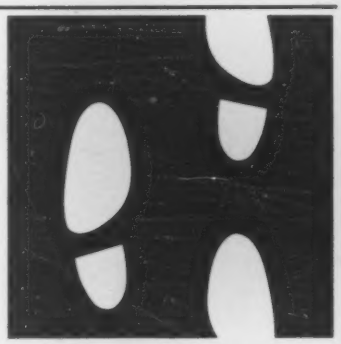
When you want to reach Buffalo, all it takes is one buy — The Buffalo News. Call Warren T. Colville, VP/Advertising Director, at 716-849-5440 for information on The News.

THE BUFFALO NEWS
One News Plaza, P.O.Box 100, Buffalo, NY 14240

Sources: Sales and Marketing Management, 1989; ABC Fas-Fax for 6 months ended 3/31/90.



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U.S. General Services Administration

Ski and *Sunset*.

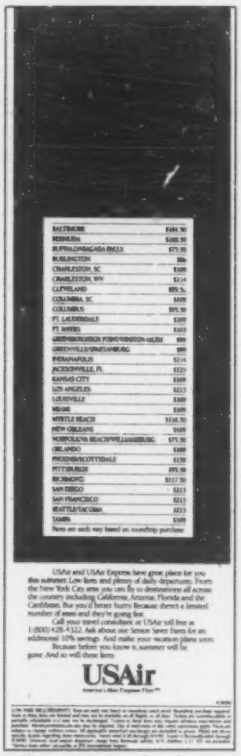
Total ad spending for the first quarter this year was $23.6 million.

Along with its image campaign, Delta has tactical strategies depending on what the specific objective is in the region, according to Jordan. For example, the Dallas/Ft. Worth ad stresses how easy it is to make connections. Leisure travelers are lured by Dream Vacation packages that include air and hotel. The airline is also the official carrier of Disneyland and Disney World.

"We do a tremendous amount of cooperative in newspapers and magazines and some limited television with the Disney organization," says Jordan. "It really gives us the rub-off we need."

Delta also has a marketing program called Fantastic Flier for children. Here, every child between two and 12 who gets on a Delta plane is given a Mickey Mouse visor and a 48-page puzzle and game magazine to keep him or her entertained while flying. It doesn't end when the plane lands. They receive an enrollment card, which enables them to get the magazine mailed to their home four times a year until they're 13. Currently there are about 75,000 members. "This is a long-term strategy," says Jordan. "If we build brand loyalty today, they will be our customers tomorrow."

Delta's revenues were $6.9 billion in 1988, according to *Fortune*.



USAir and USAir Express have great plans for you this summer. Low fares and plenty of daily departures. From the New York City area you can fly to destinations all across the country including California, Arizona, Florida and the Caribbean. But you'd better hurry. Because there's a limited number of seats and they're going fast.

Call your travel consultant or USAir toll free at 1-(800)-428-4322. Ask about our Senior Saver fares for an additional 10% savings. And make your vacation plans soon. Because before you know it, summer will be gone. And so will these fares.

USAir

Newspaper ads stress price and get half of all airlines' budgets.

USAir

Ever since August 1989, USAir has been struggling to fully integrate Piedmont into its system and has not initiated progressive advertising or marketing programs, according to Tad Trantum, an airline analyst and a partner with J.C. Bradford.

"They've had more problems than they envisioned at the outset," he says. "I think it's more putting out fires rather than the luxury of sitting back and strategizing. They're probably a year or two away from doing that." USAir declined to comment on any part of its marketing and advertising strategies.

Some of its indigestion stems from pilot seniority, dealing with commuter feeders and making the hubs efficient. The airline's strength is east of Chicago and north of Atlanta. "Those routes will be extremely valuable over time as long as they do a good job," says Trantum. "They've got to put a real good senior management team together."

Besides swallowing Piedmont, USAir also recently acquired PSA on the competitive West Coast. "They're having a tough time out there," says Airline Economics' Howard. "Southwest recently moved into the San Francisco market and cut fares for introduction."

USAir spent a total of $26.7 million last year, excluding Piedmont. About $8.3 million went to network tv on big prime-time shows such as *Roseanne*, *The Wonder Years* and *thirtysomething*, as well as news programing such as *20/20*, *Today* and *Sun-*

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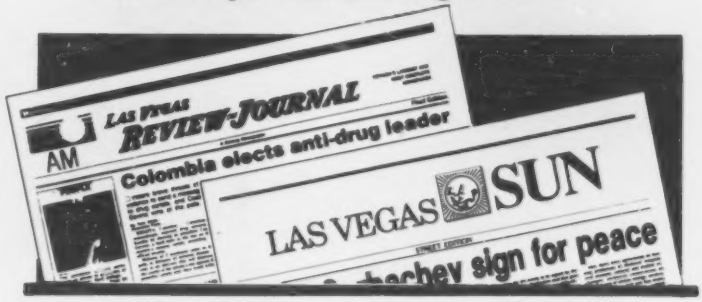

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Las Vegas Review Journal
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Represented by the Papert Companies

*SOURCE: 1988 BELDEN CONTINUING MARKET STUDY

day Morning. Unlike the other carriers, sports were used lightly, usually a football spot, according to BAR.

In print, no magazines were used, but newspapers received about $7.8 million. About $7.9 million has been invested in this year's first quarter.

Northwest

Northwest is currently planning a new campaign it cannot yet discuss. The most recent campaign targeted international fliers, particularly businessmen, with a service theme. Northwest's agency, Saatchi & Saatchi, developed a campaign that showed scenes of foreign locales interspersed with advice: "Rare scotch is the best gift for a Japanese businessman."

Television spots ran primarily on network at a cost of $16 million last year, according to LNA. Placements included NFL Monday Night Football, as well as prime-time shows such as *60 Minutes*, *Murder, She Wrote* and *The Magical World of Disney*.

On cable, which was a $1.5 million buy last year, the commercials targeting the business flier found a niche on news-oriented programing, such as CNN's *Money Line* and *Business This Morning*. Thirty- to 90-second news reports were wrapped up by a billboard identifying Northwest as the sponsor. This set the stage for the 60-second Northwest commercial that followed.

In print, newspapers took $22.2 million of the budget, while magazines received a healthy $8.2 million, according to LNA. Magazine titles run the gamut of business books, including the *Harvard Business Review*, *Forbes* and *Fortune*. Other titles include *Golf*, *Condé Nast Traveler*, *Life*, *McCall's*, *Prevention* and *Sports Illustrated*. Total ad spending for all media in first quarter 1990 was $11.7 million.

The airline went private in June 1989 when it was acquired by KLM, which had a positive effect on the company. "Employee morale is better since the new guys have taken over," says John Pincavage, a partner with The Transportation Group Ltd., a New York-based consulting company. "People in the cabin are doing their jobs with a smile instead of a frown."

TWA

TWA is positioned as an international carrier and plays leap-frog with Pan Am for the number-one position in that segment.

Frequent Flyer programs are expensive, but airlines see no way out.

The primary target is the business traveler, and the airline was the first to develop business class seating.

The media mix for this target is television news, news-oriented radio and news and business magazines, which include *Business Week*, *Economist*, *Financial World*

A LOOK AHEAD TO

NOVEMBER

BRAND REPORT: COMMUNICATIONS–CELLULAR TELEPHONES

Everyone's talking about the new business tool of the '90s. Here's an in-depth look at the advertising dollars being spent to reach out and touch clients.

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and *Forbes*. Overall spending totaled $47.6 million, with spot tv taking $12.3 million of the pie and magazines receiving just under $5 million, according to LNA.

A recent campaign from Y&R spending $40 million to upgrade first-class and business-class upgrades. No traditional network tv was used. Ira Tumpowsky, senior vice president, media director at Young & Rubicam, explains, "We advertise destinations and tend to think of ourselves as a local market client rather than as a network client."

This winter, TWA is expected to spend upwards of $2 million in spot cable to target football fans in New York, Boston, Los Angeles, San Francisco, Chicago, Philadelphia, Kansas City and Washington.

Leisure travelers are targeted through newspapers, at a cost of $28.2 million last year. Entertainment radio programing is also bought, Tumpowsky explains, because of the way fares change. Radio provides more flexibility. Ad spending in the first quarter this year reached $13.8 million.

Another lure for the leisure traveler is TWA's subsidiary called Getaway Vacations, which includes round trip airfare, connections and hotels at discount prices. Recently advertised packages include six days in Australia for $674 and seven nights in Hawaii for $599.

Based on *Fortune*'s ranking, TWA pulled in $4.3 million in 1988 and flew about 35 million passengers to its destinations.

Pan Am

For the past several years, Pan Am has focused on improved service. "We've put money into training and customer service," says an airline spokesperson. The agency is Della Femina McNamee, New York.

Spot tv took $5.8 million out of the $46.2 million nine media total and targeted business travelers watching mornings news shows, as well as Sunday news programs and sports.

Newspapers took $35.3 million. In addition, Pan Am runs in newspapers what it calls white paper ads, basically progress reports from the chairman. Overall ad expenditures for the first quarter of this year are $14.9 million.

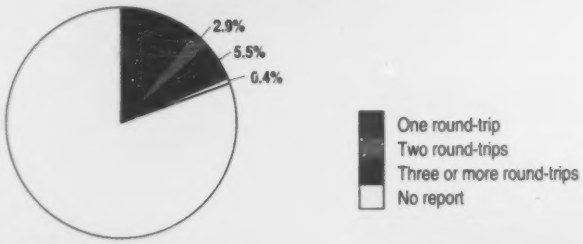
Leisure travelers make up about 50% of those flying on Pan Am, according to the company, so in addition to its frequent-flier program and business-class seating, there's a Pan Am Holidays Tours program. It's a travel assist network that gives travelers access to 24-hour emergency assistance. They can call and receive help, whether they need basic travel-plan information or to find a hospital somewhere in Europe. ■

BRAND REPORT INDEX

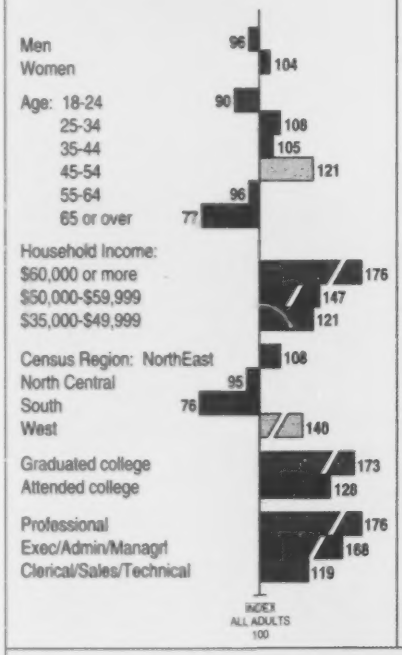
How to read: Our indices of user demographics and media preferences are used to indicate the direction and amount of difference from the average. The index of the average is, by definition, 100. Thus, an index of 112 reflects a 12% above-average incidence. An index of 89 indicates an 11% below-average incidence.

DOMESTIC AIRLINE TRAVEL

% of adults who travelled by domestic airlines in past 12 months

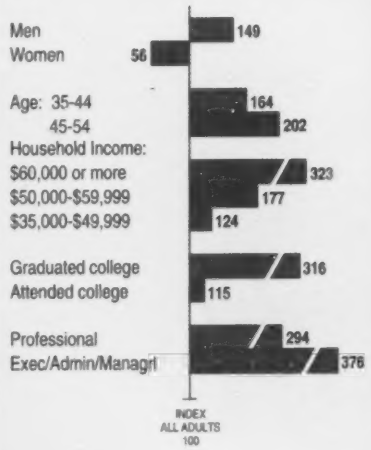


DOMESTIC AIRLINE TRAVEL KEY DEMOGRAPHICS

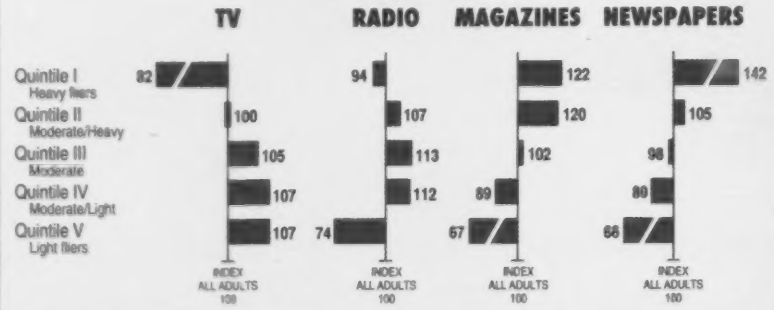


DOMESTIC AIRLINE TRAVEL FREQUENT BUSINESS TRAVELERS KEY DEMOGRAPHICS

(3 or more round trips for business purposes in past 12 months)



DOMESTIC AIRLINE TRAVEL MEDIA EXPOSURE


TV
RADIO
MAGAZINES
NEWSPAPERS
Quintile I Heavy fliers 82 94 122 142
Quintile II Moderate/Heavy 100 107 120 105
Quintile III Moderate 105 113 102 98
Quintile IV Moderate/Light 107 112 89 80
Quintile V Light fliers 107 74 67 66
INDEX ALL ADULTS 100

Source: Mediamark Research Inc. Spring 1990

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ECONOMIC EYE

MAGAZINE AD SCORECARD	Ad Pages July 1990	% change from July 1989	Dollars spent (000)	% change from July 1989
1. Skin care, Creams, Lotions and Oils	92.61	-34.8	4,140.4	-24.8
2. Lip and Eye Beauty Products	43.26	-11.7	2,243.2	18.4
3. Scents and Fragrances	29.14	-40.8	901.2	-46.6
4. Facial Makeup Products	30.0	109.4	1,167.8	209.7
5. Prepared Dinners and Entrees (including pizzas)	9.50	-65.5	562.9	-61.5
6. Liquor	367.11	5.1	17,032.7	8.1
7. Cigarettes	397.09	-34.2	25,002.3	-29.1
8. Soaps and Detergents	6.59	-61.2	555.9	-38.0
9. Passenger Cars, Domestic	437.86	50.3	29,130.4	97.7
10. Passenger Cars, Imported	293.04	19.4	18,142.4	27.9

Source: Publishers Information Bureau as prepared by Leading National Advertisers.

MEDIA COST INDEX

(The Media Cost Index is based on unit costs, which are the end-product of circulation/audience and CPM adjustments. They do not represent the efficiency of a given medium, only the out-of-pocket costs.)

1985 = 100 ← 1989 → ← 1990 →

	Oct.	% change	Nov.	% change	Dec.	% change	Jan.	% change	Feb.	% change	Mar.	% change	Apr.	% change	May	% change
Network TV																
Daytime	80	-28	82	+3	74	+0.8	78	+0.6	75	+10	78	+14	74	+2	75	+13
Nighttime	119	+19	124	+10	123	+12	129	+6	131	+9	146	+17	118	+6	129	+1
Spot TV																
Prime time	116	-9	128	+23	130	+1	148	+5	130	+3	127	+2	130	-0.6	135	+7
Daytime	94	-12	98	-5	97	-1	122	+5	100	-16	99	+2	102	+2	107	+8
Network radio	142	+8	139	+11	131	+10	173	+10	157	+11	152	+9	147	+15	150	+15
Spot radio	–	–	–	–	114	+4	–	–	–	–	118	+0.3	–	–	–	–
Consumer magazines	123	+7	123	+5	123	+3	130	+7	131	+8	131	+8	131	+7	131	+7
Natl. Sunday magazines	141	+10	141	+10	141	+10	132	+2	132	+2	139	+8	139	+8	139	+8
Business publications	123	+6	123	+6	123	+6	128	+8	128	+8	128	+8	128	+8	128	+8
Newspapers	131	+6	131	+6	131	+6	138	+6	–	–	–	–	138	+6	138	+6
Outdoor	132	+8	132	+8	132	+8	141	+3	141	+3	141	+3	141	+3	141	+3

Notes: Percentage shown is relative change from the same month/period the year before. Newspaper figures reported for January and July only.

Nielsen reports there are now 93.1 million U.S. television households, a 1.1% increase over the 1989-90 tv season.

Sources:

Nighttime Network TV- Cost per average 30-second spot, 7:30-11 p.m. Monday-Saturday and 7-11 p.m. Sunday from Broadcast Advertisers Reports' (BAR) Network TV Service.

Daytime Network TV- Cost per average 30-second spot, 10 a.m.-4:30 p.m. Monday-Friday from BAR's Network TV Service.

Nightline Spot TV- Cost per average 30-second spot, 7:30-11p.m. Monday-Saturday and 7-11p.m. Sunday from Arbitron/Broadcast Advertisers Reports' Spot TV Service.

Daytime Spot TV- Cost per average 30-second spot, 10a.m.-4:30p.m. Monday-Friday from Arbitron/BroadcastAdvertisers Reports Spot TV Service.

Network Radio- Cost per average 30-second radio announcement from BAR's Network Radio Service.

Consumer Magazines estimate based on reported SRDS cost of a page, four-color in 40 national consumer magazines, as reported by Magazine Publishers Assn.

National Sunday Mags estimate based on published (rate cards) costs of a page, four-color in the national entries.

Daily Newspapers estimate based on Newspaper Advertising Bureau report of SRDS costs per column inch of a sample of 784 newspapers weighted to represent the universe.

Outdoor Posters based on estimate prepared by Institute of Outdoor Advertising.

Spot Radio index represents cost of a 60-second spot in the top 100 markets from data supplied to Radio Expenditure Reports by major radio representatives.

Business Publications estimates based on reported SRDS cost of a page, four-color in 48 publications representing 42 business and professional classifications.